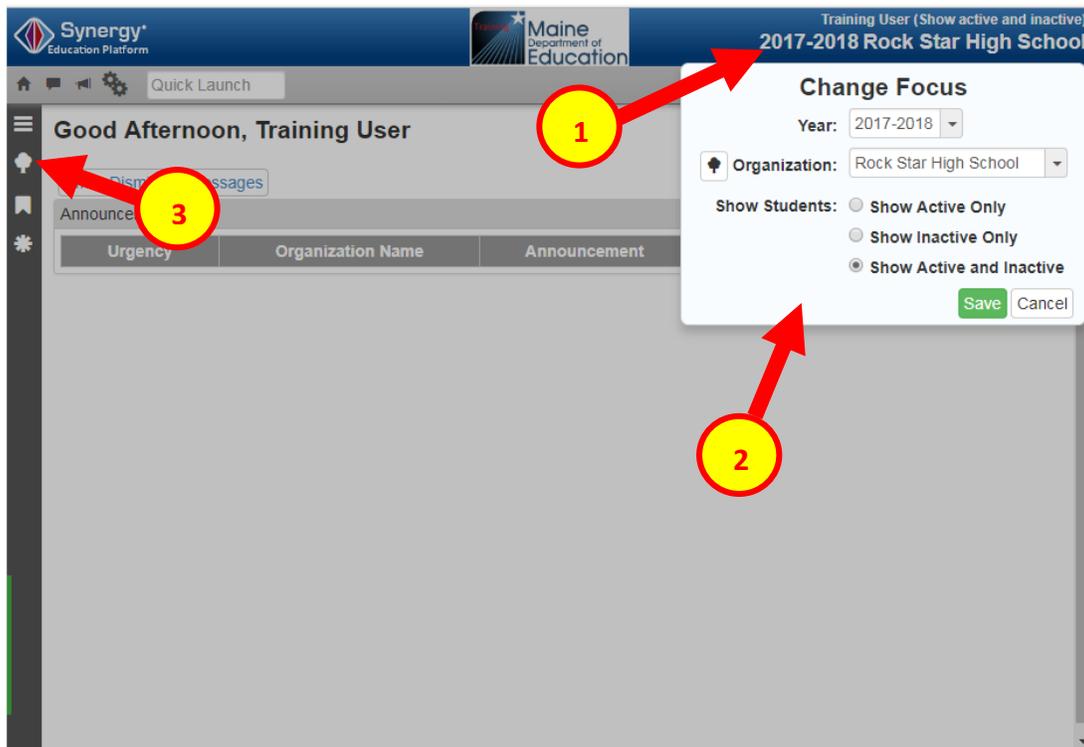


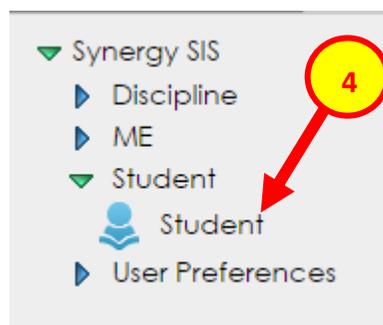
## Synergy – Enrollment Changes Guide

This guide will explain how to make changes to a student’s enrollment in Synergy. The changes are made on the Student screen and users must first have their focus at the school level:

1. In the top right, click the school year or school/district name and the Change Focus box appears.
2. Select the following in the Change Focus box and click **Save**:
  - Year:** Select the current school year (the example picture shows 2017-2018)
  - Organization:** Choose your school (the example picture shows Rock Star High School)
  - Show Students:** Show Active and Inactive
3. Click on the PAD Tree icon. 



4. In the PAD Tree, Click **Student** to navigate to the Student screen.  
(You may need to click the arrows next to Synergy SIS and Student to expand).

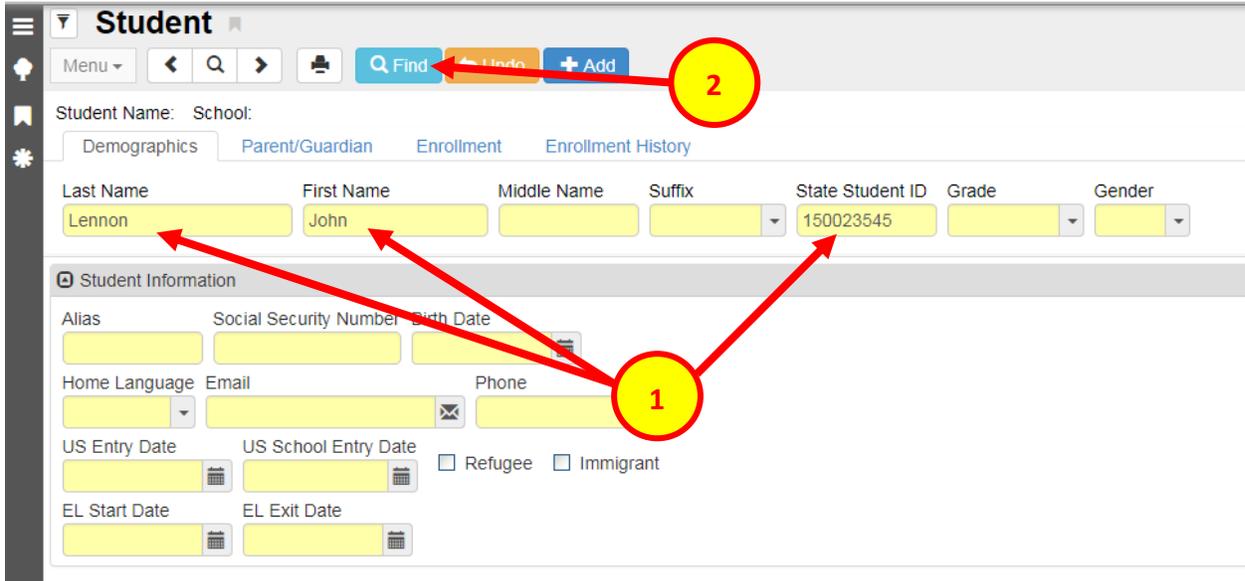


# Contents

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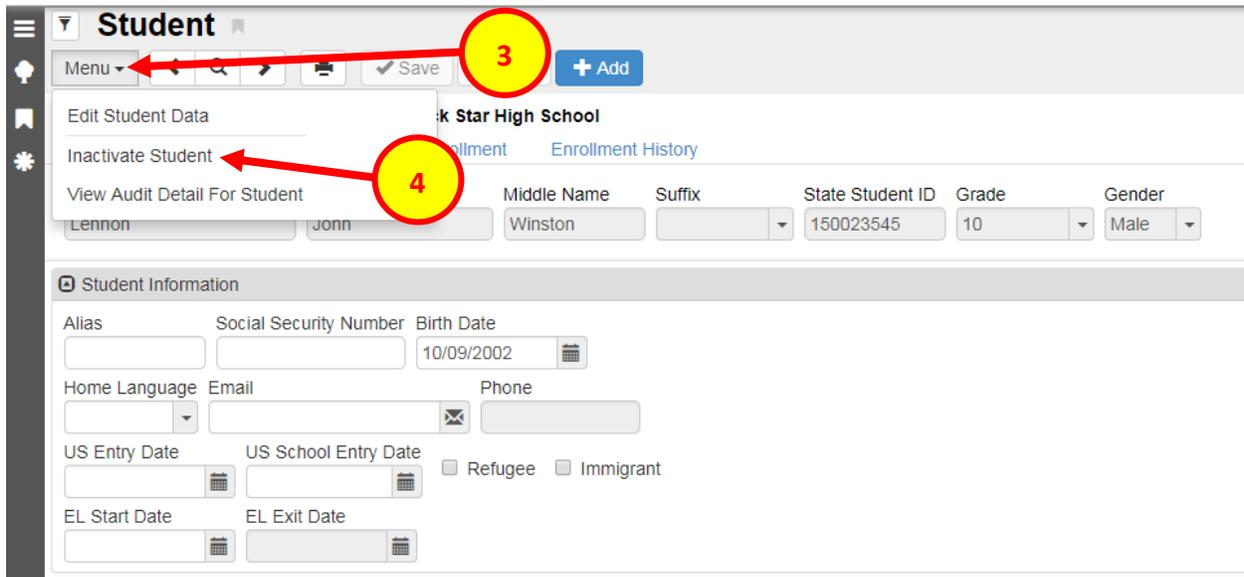
## Exiting a Student's Enrollment

1. Type in the student's Last Name and First Name or their State ID.
2. Click **Find**.



The screenshot shows the 'Student' interface. At the top, there is a search bar with a 'Find' button circled in red and labeled '2'. Below the search bar, there are tabs for 'Demographics', 'Parent/Guardian', 'Enrollment', and 'Enrollment History'. The 'Enrollment' tab is selected. Below the tabs, there are input fields for 'Last Name' (Lennon), 'First Name' (John), 'Middle Name', 'Suffix', 'State Student ID' (150023545), 'Grade', and 'Gender'. Below these fields is a section titled 'Student Information' with various fields for 'Alias', 'Social Security Number', 'Birth Date', 'Home Language', 'Email', 'Phone', 'US Entry Date', 'US School Entry Date', 'EL Start Date', and 'EL Exit Date'. There are also checkboxes for 'Refugee' and 'Immigrant'. A red arrow labeled '1' points to the 'Find' button.

3. Hover the cursor over the Menu drop down.
4. Click **Inactivate Student** in the drop down – this will create a pop up box.



The screenshot shows the 'Student' interface with the 'Menu' dropdown open. The 'Menu' dropdown is circled in red and labeled '3'. The dropdown menu contains the following options: 'Edit Student Data', 'Inactivate Student', and 'View Audit Detail For Student'. The 'Inactivate Student' option is circled in red and labeled '4'. Below the dropdown, the 'Student Information' section is visible, showing the same fields as in the previous screenshot, but with the 'State Student ID' field now containing '150023545', 'Grade' set to '10', and 'Gender' set to 'Male'.

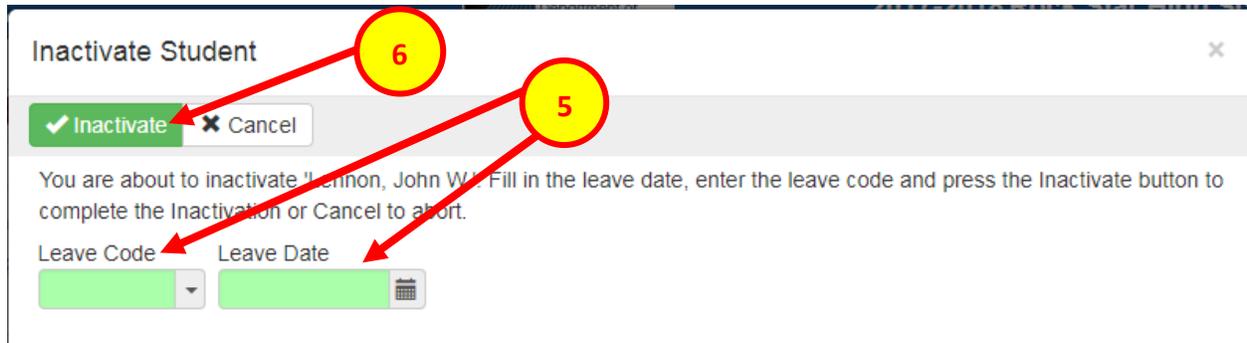
- In the pop up box, select a Leave Code (Exit Status) in the drop down and enter the Leave Date (Exit Date).

A list of Exit Status codes can be found at this link:

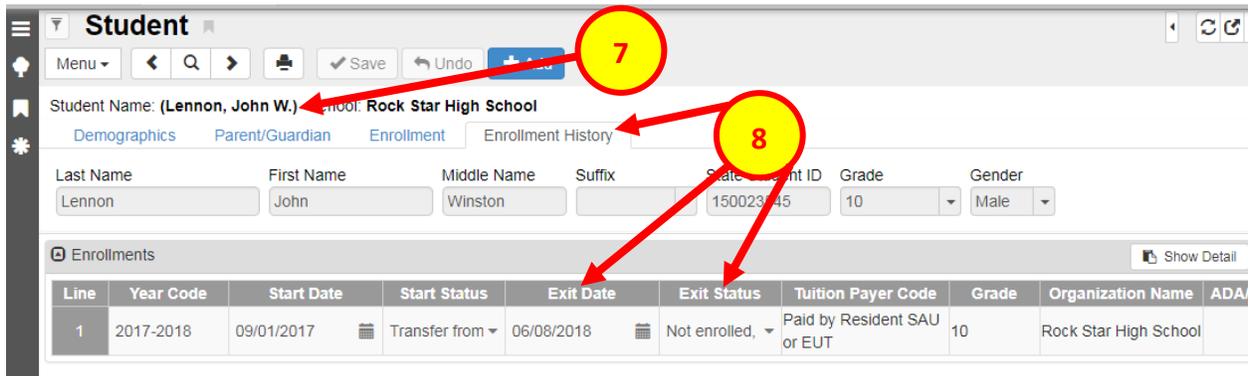
[https://www.maine.gov/oe/data/student/Synergy\\_upload.html](https://www.maine.gov/oe/data/student/Synergy_upload.html)

*Please note that the old exit code 98: End of School Year has been replaced by 03502: Not Enrolled, Eligible to Return*

- Click **Inactivate**.



- On the Student screen, the student's name now shows in parenthesis to indicate they are inactive.
- The student will also show an Exit Date and Exit Status on the **Enrollment History** tab.



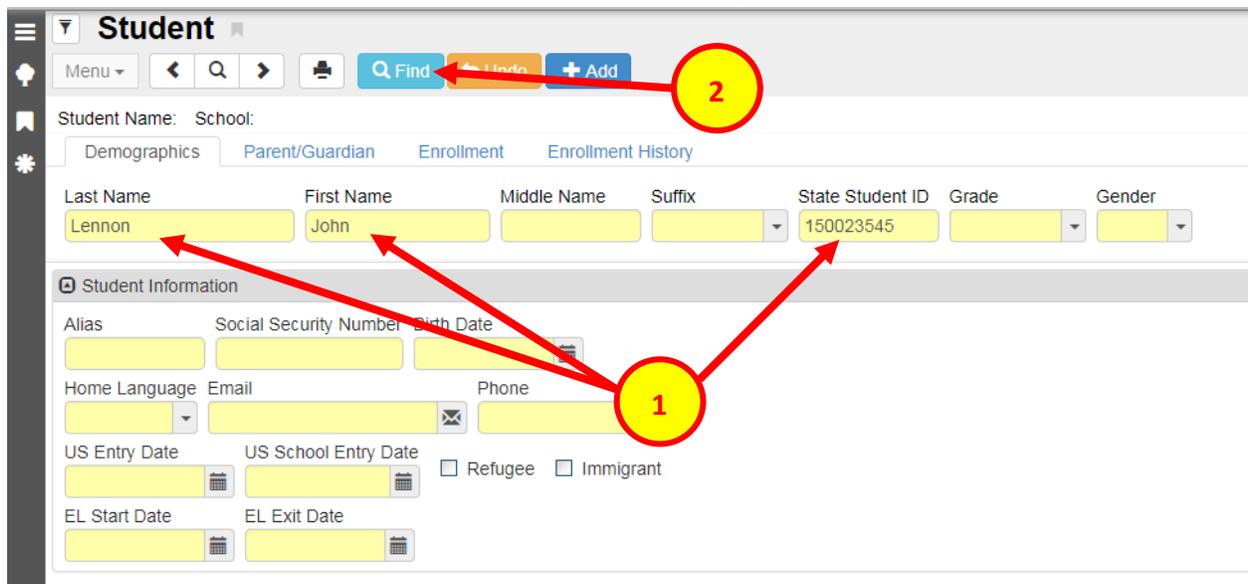
Line	Year Code	Start Date	Start Status	Exit Date	Exit Status	Tuition Payer Code	Grade	Organization Name	ADA
1	2017-2018	09/01/2017	Transfer from	06/08/2018	Not enrolled	Paid by Resident SAU or EUT	10	Rock Star High School	

## Re-Activating a Student (Remove Exit Date and Exit Status)

If a student was accidentally exited or the student never left the school as anticipated, the Exit Date and Exit Status can be removed to make the student’s enrollment active again.

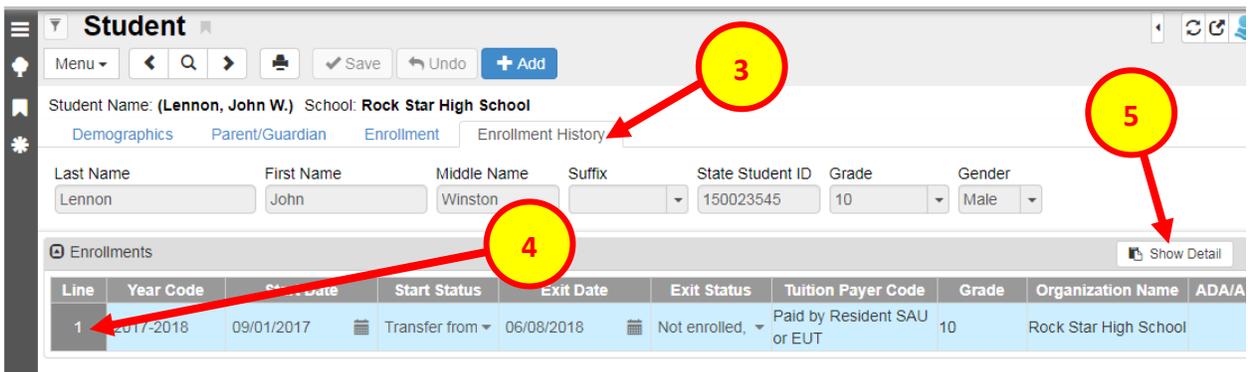
Please note these instructions are not for the situation when a student transfers out and is enrolled at another district and then returns – in this situation a new enrollment must be created.

1. Type in the student’s Last Name and First Name or their State ID.
2. Click **Find**.



The screenshot shows the 'Student' search interface. At the top, there is a search bar with a 'Find' button circled in red and labeled '2'. Below the search bar, there are input fields for 'Last Name' (Lennon) and 'First Name' (John), which are also circled in red and labeled '1'. The 'State Student ID' field contains '150023545'. Below the search fields, there is a 'Student Information' section with various fields like 'Alias', 'Social Security Number', 'Birth Date', 'Home Language', 'Email', 'Phone', 'US Entry Date', 'US School Entry Date', 'Refugee', 'Immigrant', 'EL Start Date', and 'EL Exit Date'.

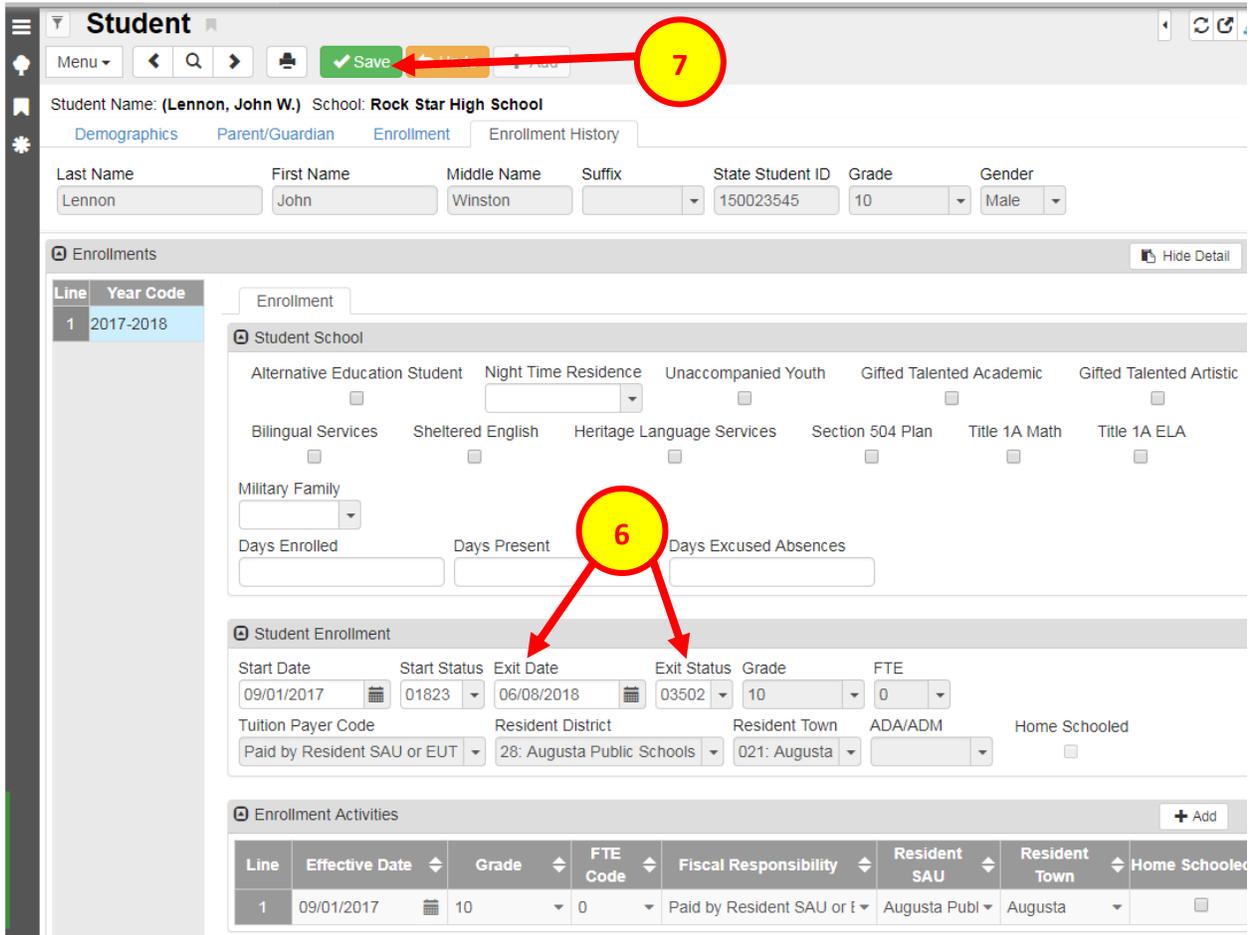
3. Click on the **Enrollment History** tab.
4. In the Line column, click on the Line number of the enrollment to select the row – the selected row will turn blue.
5. Click **Show Detail** to expand the enrollment.



The screenshot shows the 'Student Enrollment History' interface. At the top, there is a 'Student Name' field with '(Lennon, John W.)' and a 'School' field with 'Rock Star High School'. Below this, there are tabs for 'Demographics', 'Parent/Guardian', 'Enrollment', and 'Enrollment History'. The 'Enrollment History' tab is selected. Below the tabs, there is a table with columns: Line, Year Code, Start Date, Start Status, Exit Date, Exit Status, Tuition Payer Code, Grade, Organization Name, and ADA/A. The first row is selected and highlighted in blue. A 'Show Detail' button is located to the right of the table.

Line	Year Code	Start Date	Start Status	Exit Date	Exit Status	Tuition Payer Code	Grade	Organization Name	ADA/A
1	2017-2018	09/01/2017	Transfer from	06/08/2018	Not enrolled	Paid by Resident SAU or EUT	10	Rock Star High School	

- In the Student Enrollment section, remove the Exit Date and select blank from the Exit Status drop down.
- Click **Save**.

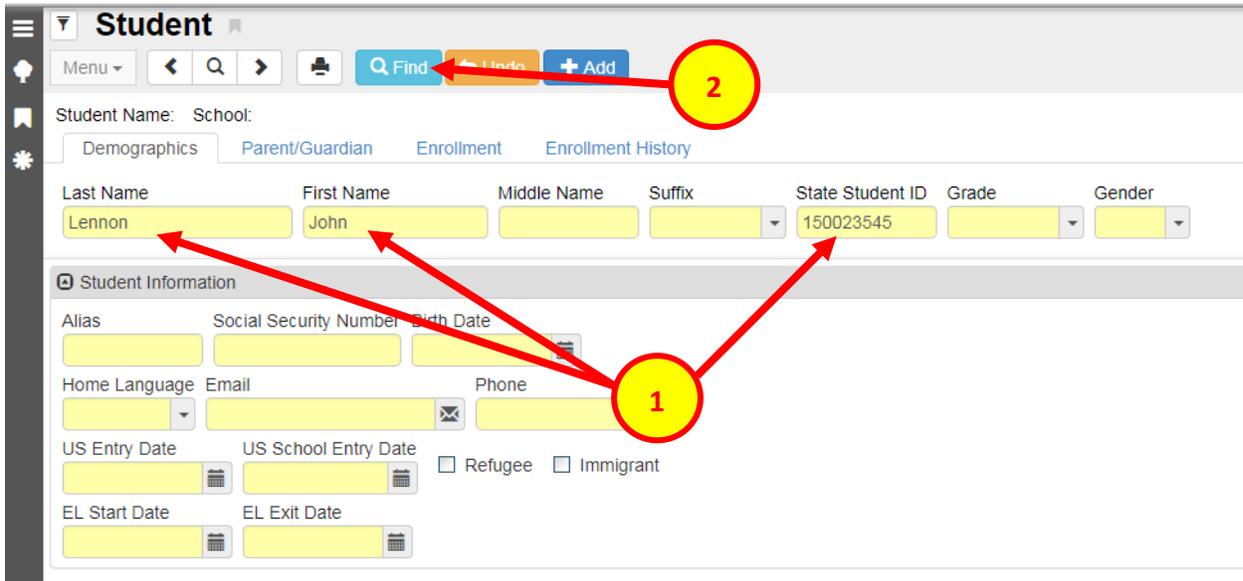


The screenshot shows the 'Student Enrollment' section of a web application. At the top, a navigation bar includes a 'Save' button, which is circled in red and labeled with a yellow circle containing the number '7'. Below this, the student's name is 'Lennon, John W.' and the school is 'Rock Star High School'. The 'Enrollments' section is expanded to show enrollment details for the 2017-2018 year. In the 'Student Enrollment' subsection, the 'Exit Date' field is empty and the 'Exit Status' dropdown is set to '03502'. Red arrows point from a yellow circle labeled '6' to these two fields. Below this, the 'Enrollment Activities' table is visible, showing a single row for the student's enrollment.

Line	Effective Date	Grade	FTE Code	Fiscal Responsibility	Resident SAU	Resident Town	Home Schooled
1	09/01/2017	10	0	Paid by Resident SAU or f	Augusta Publ	Augusta	<input type="checkbox"/>

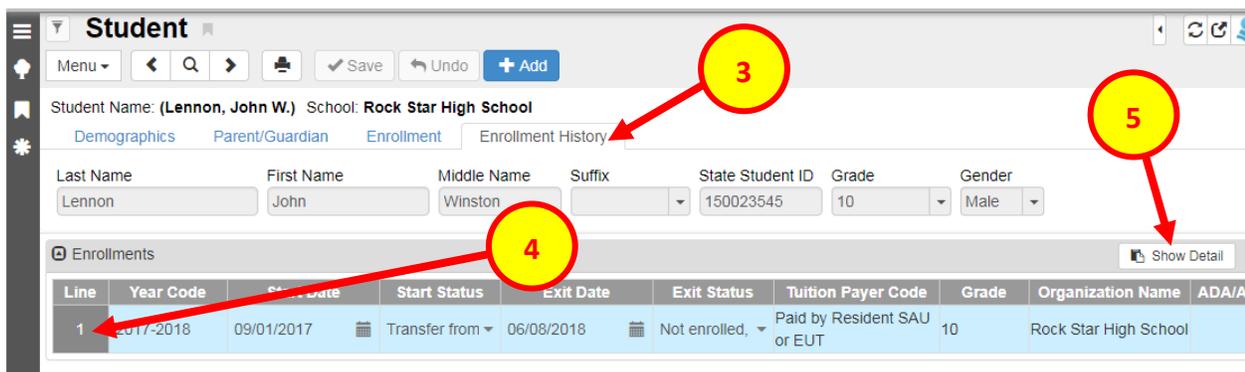
## Change the Start Date of an Enrollment

1. Type in the student's Last Name and First Name or their State ID.
2. Click **Find**.



The screenshot shows the 'Student' information form. A red circle labeled '2' highlights the 'Find' button. Red arrows point from this circle to the 'Last Name' field (containing 'Lennon') and the 'First Name' field (containing 'John'). Another red circle labeled '1' highlights the 'State Student ID' field (containing '150023545').

3. Click on the **Enrollment History** tab.
4. In the Line column, click on the Line number of the enrollment to select the row – the selected row will turn blue.
5. Click **Show Detail** to expand the enrollment.



The screenshot shows the 'Enrollment History' tab. A red circle labeled '3' highlights the 'Enrollment History' tab. A red circle labeled '4' highlights the '1' in the 'Line' column of the first row. A red circle labeled '5' highlights the 'Show Detail' button.

Line	Year Code	Start Date	Start Status	Exit Date	Exit Status	Tuition Payer Code	Grade	Organization Name	ADA/A
1	2017-2018	09/01/2017	Transfer from	06/08/2018	Not enrolled	Paid by Resident SAU or EUT	10	Rock Star High School	

6. In the Student Enrollment section, change the Start Date. In the Enrollment Activities section, change the corresponding Effective Date – both fields must be changed at the same time and must have the same date.
7. Click **Save**.

**Student**

Menu

Student Name: (Lennon, John W.) School: Rock Star High School

Demographics Parent/Guardian Enrollment Enrollment History

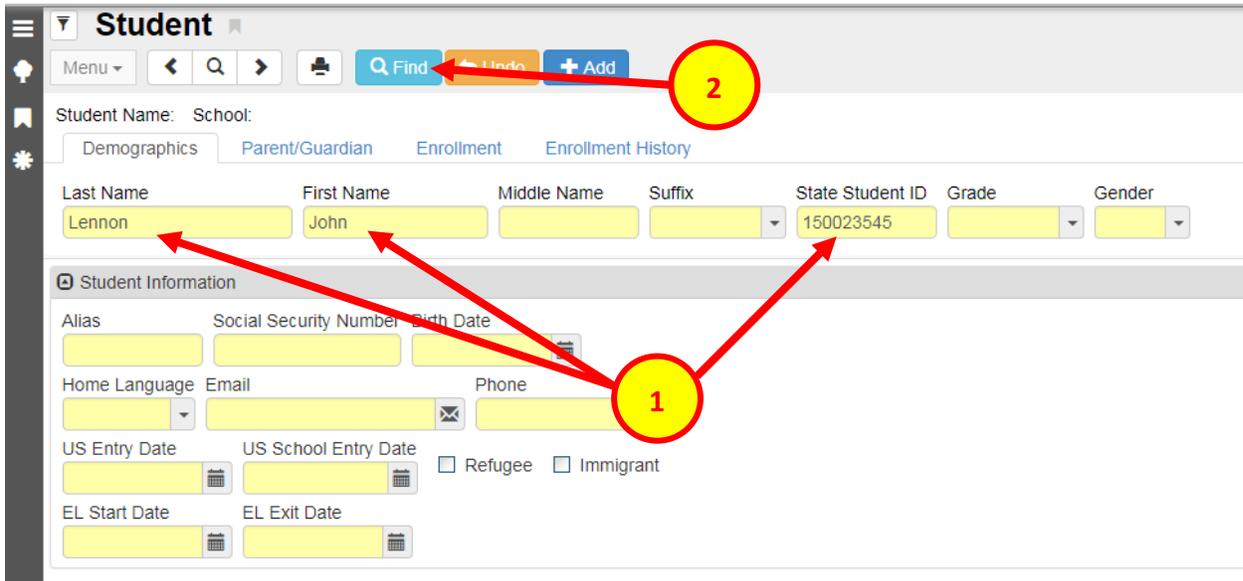
Last Name: Lennon First Name: John Middle Name: Winston Suffix: State Student ID: 150023545 Grade: 10 Gender: Male

**Enrollments**

Line	Year Code	Enrollment																
1	2017-2018	<p><b>Student School</b></p> <p>Alternative Education Student <input type="checkbox"/> Night Time Residence <input type="checkbox"/> Unaccompanied Youth <input type="checkbox"/> Gifted Talented Academic <input type="checkbox"/> Gifted Talented Artistic <input type="checkbox"/></p> <p>Bilingual Services <input type="checkbox"/> Sheltered English <input type="checkbox"/> Heritage Language Services <input type="checkbox"/> Section 504 Plan <input type="checkbox"/> Title 1A Math <input type="checkbox"/> Title 1A ELA <input type="checkbox"/></p> <p>Military Family <input type="checkbox"/></p> <p>Days Enrolled <input type="text"/> Days Present <input type="text"/> Days Excused Absences <input type="text"/></p> <p><b>Student Enrollment</b></p> <p>Start Date: 09/01/2017 Start Status: 01823 Exit Date: 06/08/2018 Exit Status: 03502 Grade: 10 FTE: 0</p> <p>Tuition Payer Code: Paid by Resident SAU or EUT Resident District: 08: Augusta Public Schools Resident Town: 021: Augusta ADA/ADM: Home Schooled <input type="checkbox"/></p> <p><b>Enrollment Activities</b> <input type="button" value="Add"/></p> <table border="1"> <thead> <tr> <th>Line</th> <th>Effective Date</th> <th>Grade</th> <th>FTE Code</th> <th>Fiscal Responsibility</th> <th>Resident SAU</th> <th>Resident Town</th> <th>Home Schooled</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>09/01/2017</td> <td>10</td> <td>0</td> <td>Paid by Resident SAU or EUT</td> <td>Augusta Publi</td> <td>Augusta</td> <td><input type="checkbox"/></td> </tr> </tbody> </table>	Line	Effective Date	Grade	FTE Code	Fiscal Responsibility	Resident SAU	Resident Town	Home Schooled	1	09/01/2017	10	0	Paid by Resident SAU or EUT	Augusta Publi	Augusta	<input type="checkbox"/>
Line	Effective Date	Grade	FTE Code	Fiscal Responsibility	Resident SAU	Resident Town	Home Schooled											
1	09/01/2017	10	0	Paid by Resident SAU or EUT	Augusta Publi	Augusta	<input type="checkbox"/>											

## Change the Exit Date of an Enrollment

1. Type in the student's Last Name and First Name or their State ID.
2. Click **Find**.



**Student**

Menu < > Find Undo Add

Student Name: School:

Demographics Parent/Guardian Enrollment Enrollment History

Last Name: Lennon First Name: John Middle Name: Suffix: State Student ID: 150023545 Grade: Gender:

Student Information

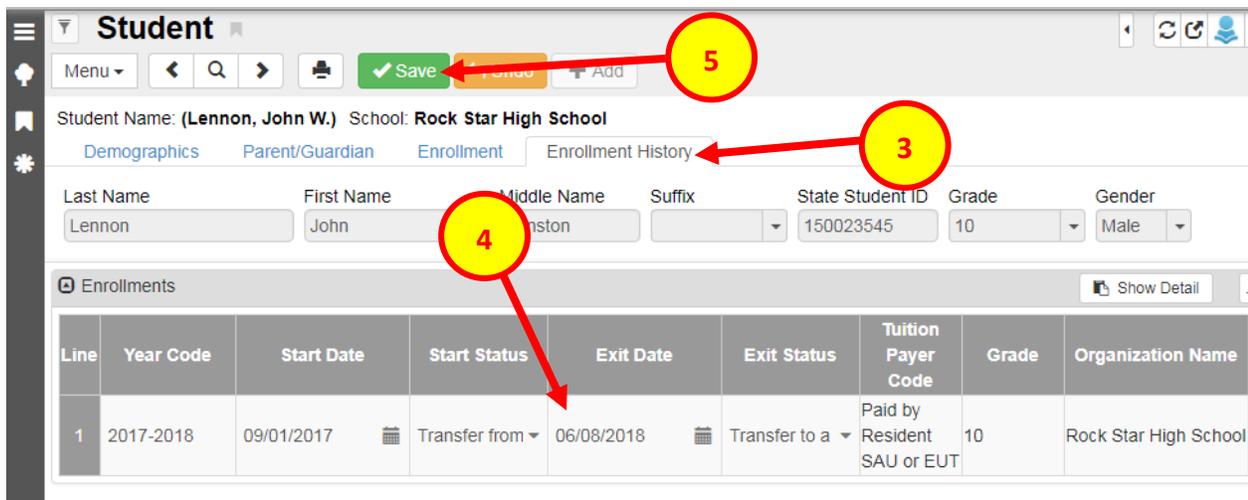
Alias Social Security Number Birth Date

Home Language Email Phone

US Entry Date US School Entry Date  Refugee  Immigrant

EL Start Date EL Exit Date

3. Click on the **Enrollment History** tab.
4. Change the Exit Date.
5. Click **Save**.



**Student**

Menu < > Save Undo Add

Student Name: (Lennon, John W.) School: Rock Star High School

Demographics Parent/Guardian Enrollment Enrollment History

Last Name: Lennon First Name: John Middle Name: nston Suffix: State Student ID: 150023545 Grade: 10 Gender: Male

Enrollments Show Detail

Line	Year Code	Start Date	Start Status	Exit Date	Exit Status	Tuition Payer Code	Grade	Organization Name
1	2017-2018	09/01/2017	Transfer from	06/08/2018	Transfer to a	Paid by Resident SAU or EUT	10	Rock Star High School

## Change the Start Status or Exit Status of an Enrollment

1. Type in the student's Last Name and First Name or their State ID.
2. Click **Find**.

The screenshot shows the 'Student' information page. A red circle labeled '2' is around the 'Find' button. A red circle labeled '1' is around the 'Last Name' field (containing 'Lennon') and the 'First Name' field (containing 'John'). Red arrows point from the 'Find' button to the 'Last Name' and 'First Name' fields, and from the 'Last Name' field to the 'Find' button.

3. Click on the **Enrollment History** tab.
4. Select the Start Status or Exit Status from the drop down.  
A list of Start Status and Exit Status codes can be found at this link:  
[https://www.maine.gov/doe/data/student/Synergy\\_upload.html](https://www.maine.gov/doe/data/student/Synergy_upload.html)
5. Click **Save**.

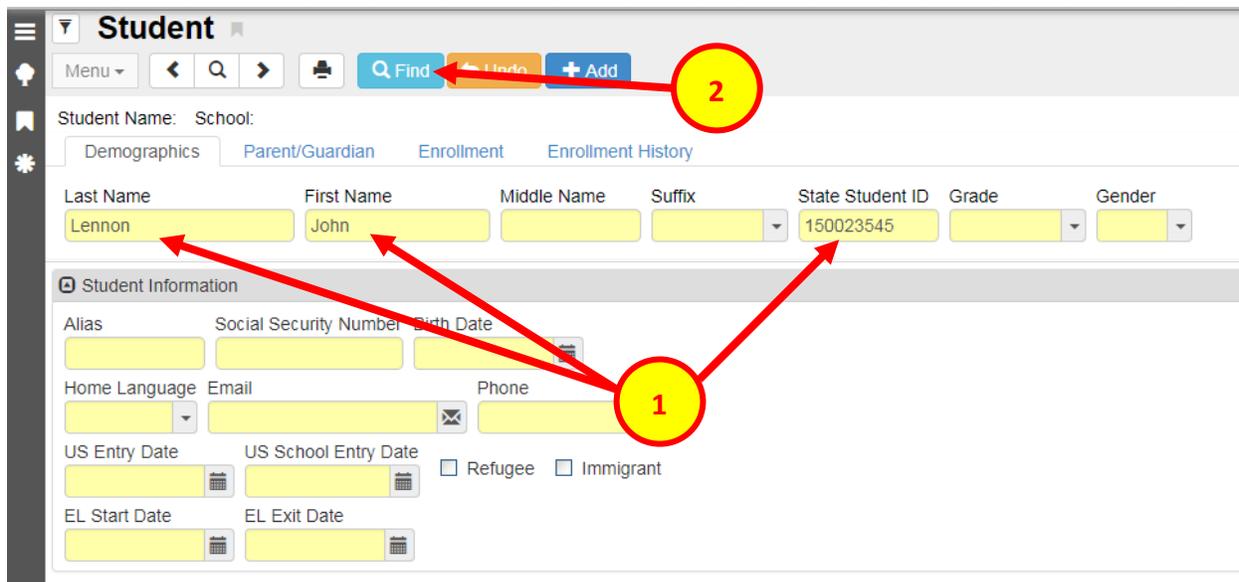
The screenshot shows the 'Enrollment History' tab. A red circle labeled '3' is around the 'Enrollment History' tab. A red circle labeled '4' is around the 'Start Status' dropdown menu in the first row of the table, which is currently set to 'Transfer from'. A red circle labeled '5' is around the 'Save' button. Red arrows point from the 'Save' button to the 'Start Status' dropdown, and from the 'Start Status' dropdown to the 'Save' button.

Line	Year Code	Start Date	Start Status	Exit Date	Exit Status	Tuition Payer Code	Grade	Organization Name
1	2017-2018	09/01/2017	Transfer from	06/08/2018	Transfer to a	Paid by Resident SAU or EUT	10	Rock Star High School

## Change a Student's Name or Gender

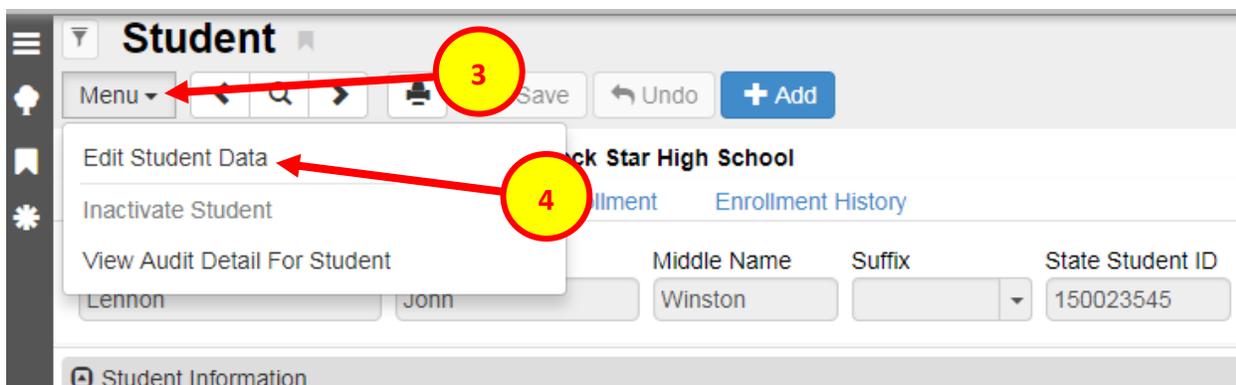
These steps should only be completed to update the student's legal name or legal gender.

1. Type in the student's Last Name and First Name or their State ID.
2. Click **Find**.



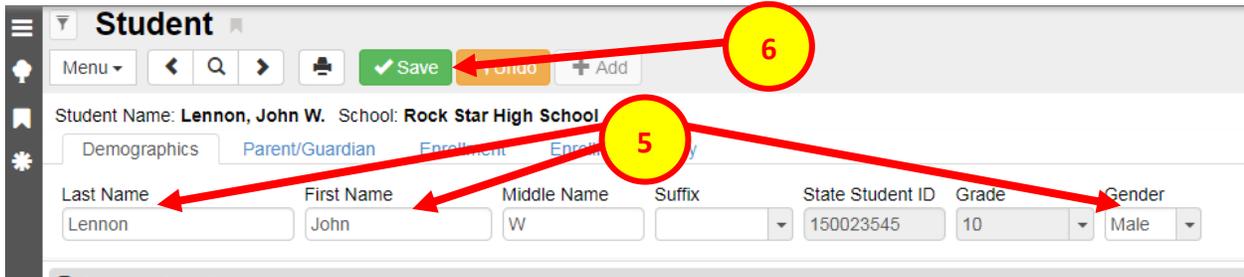
The screenshot shows the 'Student' interface. At the top, there is a 'Find' button with a magnifying glass icon, circled in red with the number '2'. Below it, the 'Student Name' and 'School' fields are visible. The 'Demographics' tab is selected. The form contains several input fields: 'Last Name' (Lennon), 'First Name' (John), 'Middle Name', 'Suffix', 'State Student ID' (150023545), 'Grade', and 'Gender'. Below these is the 'Student Information' section with fields for 'Alias', 'Social Security Number', 'Birth Date', 'Home Language', 'Email', 'Phone', 'US Entry Date', 'US School Entry Date', 'EL Start Date', and 'EL Exit Date'. There are also checkboxes for 'Refugee' and 'Immigrant'. A red circle with the number '1' is placed over the 'Student Information' section, with red arrows pointing to the 'Last Name', 'First Name', and 'State Student ID' fields.

3. Hover the cursor over the Menu drop down.
4. Click **Edit Student Data** in the drop down - this will unlock the Last Name, First Name, and Gender fields.



The screenshot shows the 'Student' interface with the 'Menu' dropdown open. The 'Menu' button is circled in red with the number '3'. The dropdown menu is open, showing options: 'Edit Student Data', 'Inactivate Student', and 'View Audit Detail For Student'. The 'Edit Student Data' option is circled in red with the number '4'. The background shows the same form as the previous screenshot, but with the 'Last Name' field now containing 'Lennon', 'First Name' containing 'John', and 'Middle Name' containing 'Winston'. The 'State Student ID' is still '150023545'.

5. Type in the Last Name or First Name fields (if applicable)  
Select the Gender in the drop down (if applicable)
6. Click **Save**.



The screenshot shows the 'Student' form in the Synergy system. The form is titled 'Student' and includes a 'Save' button. The student's name is 'Lennon, John W.' and the school is 'Rock Star High School'. The form has several tabs: 'Demographics', 'Parent/Guardian', 'Enrollment', and 'Enrollment History'. The 'Demographics' tab is active, showing fields for 'Last Name', 'First Name', 'Middle Name', 'Suffix', 'State Student ID', 'Grade', and 'Gender'. The 'Last Name' field contains 'Lennon', the 'First Name' field contains 'John', the 'Middle Name' field contains 'W', the 'State Student ID' field contains '150023545', the 'Grade' field contains '10', and the 'Gender' field is set to 'Male'. Red arrows point from a yellow circle labeled '5' to the 'Last Name', 'First Name', and 'Gender' fields. Another yellow circle labeled '6' points to the 'Save' button.

Last Name	First Name	Middle Name	Suffix	State Student ID	Grade	Gender
Lennon	John	W		150023545	10	Male

Note: Synergy does not keep a record of name changes and the student is only searchable using the current name.

## Change a Student's Grade

1. Type in the student's Last Name and First Name or their State ID.
2. Click **Find**.

**Student**

Menu

Student Name: School:

Demographics Parent/Guardian Enrollment Enrollment History

Last Name: Lennon First Name: John Middle Name: Suffix: State Student ID: 150023545 Grade: Gender:

**Student Information**

Alias Social Security Number Birth Date

Home Language Email Phone

US Entry Date US School Entry Date  Refugee  Immigrant

EL Start Date EL Exit Date

**Use Steps 3 through 7 to correct a student's grade**

**Use Steps 8 through 9 when the student's grade changes during the school year.**

3. Click on the **Enrollment History** tab.
4. In the Line column, click on the Line number of the enrollment to select the row – the selected row will turn blue.
5. Click **Show Detail** to expand the enrollment.

**Student**

Menu

Student Name: **Lennon, John W.** School: **Rock Star High School**

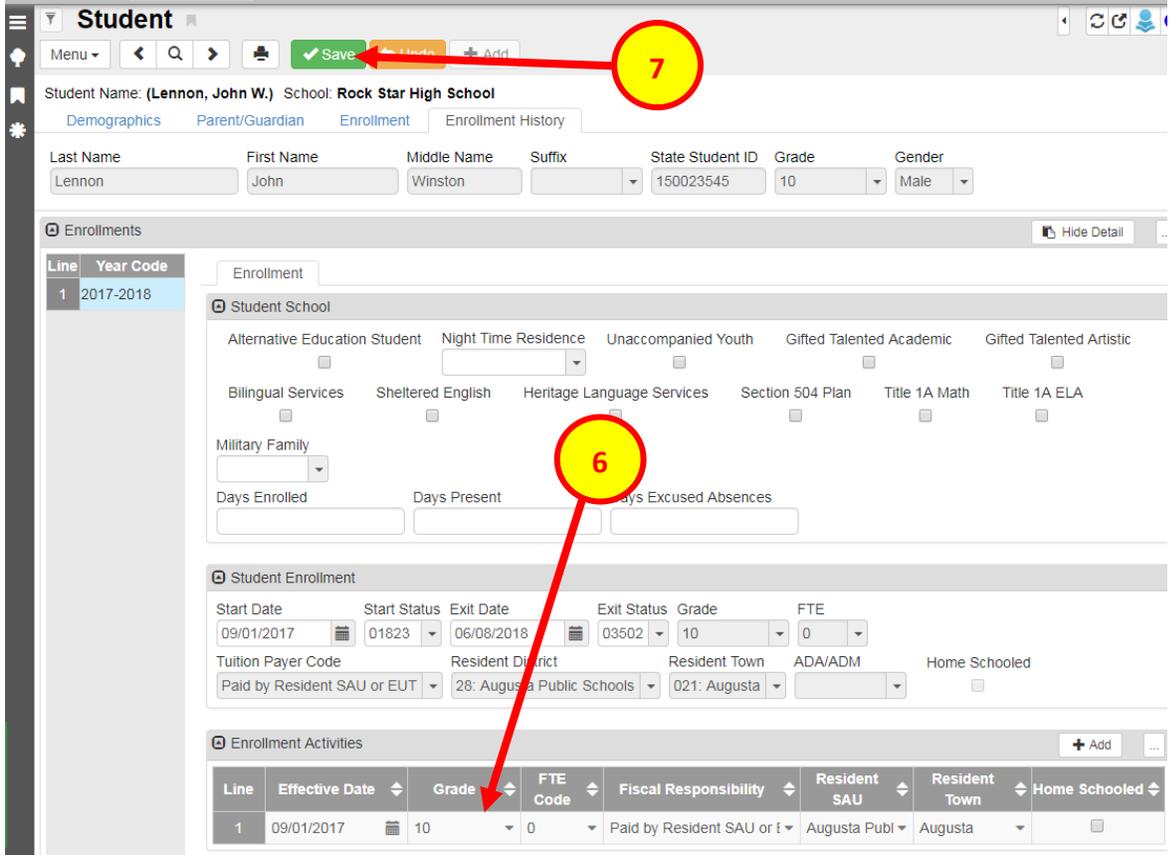
Demographics Parent/Guardian Enrollment Enrollment History

Last Name: Lennon First Name: John Middle Name: Suffix: State Student ID: 150023545 Grade: 10 Gender: Male

**Enrollments**

Line	Year Code	Start Date	Start Status	Exit Date	Exit Status	Tuition Payer Code	Grade	Organization Name	ADA/
1	2017-2018	09/01/2017	Transfer from			Paid by Resident SAU or EUT	10	Rock Star High School	

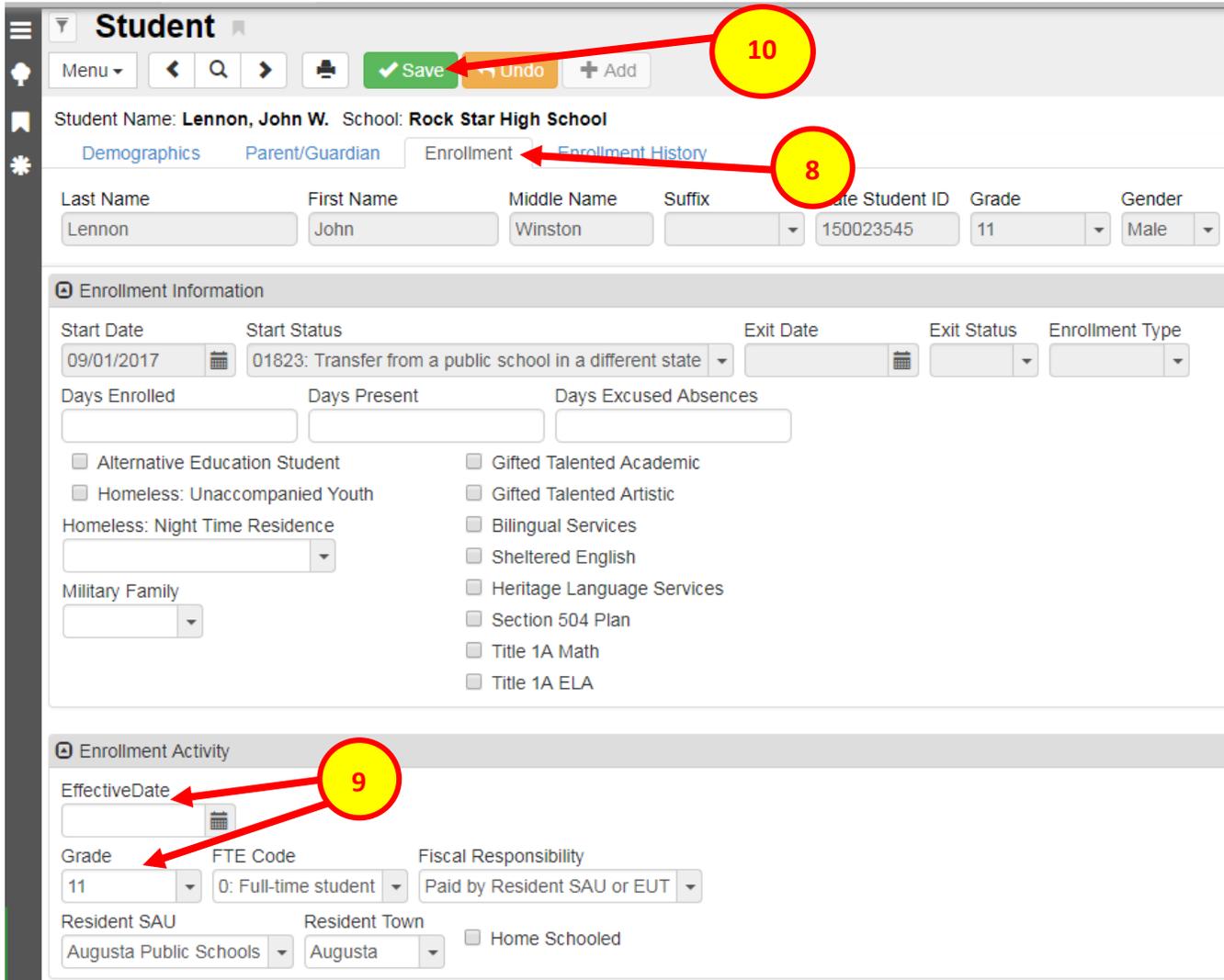
- 6. In the Enrollment Activities section, select the Grade in the drop down.
- 7. Click **Save**.



The screenshot shows the 'Student Enrollment Activities' section of a web application. At the top, there is a 'Save' button highlighted with a red arrow and a yellow circle containing the number '7'. Below this, the 'Enrollment Activities' table is visible. A red arrow points from a yellow circle containing the number '6' to the 'Grade' dropdown menu in the first row of the table. The table has the following data:

Line	Effective Date	Grade	FTE Code	Fiscal Responsibility	Resident SAU	Resident Town	Home Schooled
1	09/01/2017	10	0	Paid by Resident SAU or f	Augusta Publ	Augusta	<input type="checkbox"/>

8. Click on the **Enrollment** tab.
9. In the Enrollment Activity section, type in the Effective Date (the day the grade change occurred) and select the Grade in the drop down.
10. Click **Save**.



The screenshot shows the 'Student' profile page for **Lennon, John W.** at **Rock Star High School**. The 'Enrollment' tab is selected. The form includes fields for student demographics, enrollment information, and enrollment activity. Red circles and arrows highlight the 'Save' button (10), the 'Enrollment' tab (8), and the 'EffectiveDate' field (9).

**Student Information:**

Last Name	First Name	Middle Name	Suffix	State Student ID	Grade	Gender
Lennon	John	Winston		150023545	11	Male

**Enrollment Information:**

Start Date	Start Status	Exit Date	Exit Status	Enrollment Type
09/01/2017	01823: Transfer from a public school in a different state			

**Enrollment Activity:**

EffectiveDate	Grade	FTE Code	Fiscal Responsibility	Resident SAU	Resident Town	Home Schooled
	11	0: Full-time student	Paid by Resident SAU or EUT	Augusta Public Schools	Augusta	<input type="checkbox"/>

## Change the Resident SAU, Resident Town, and Fiscal Responsibility

1. Type in the student’s Last Name and First Name or their State ID.
2. Click **Find**.

**Student**

Menu < > Find Undo + Add

Student Name: School:

Demographics Parent/Guardian Enrollment Enrollment History

Last Name: Lennon First Name: John Middle Name: Suffix: State Student ID: 150023545 Grade: Gender:

**Student Information**

Alias Social Security Number Birth Date

Home Language Email Phone

US Entry Date US School Entry Date  Refugee  Immigrant

EL Start Date EL Exit Date

**Use Steps 3 through 7 to correct a student’s Resident SAU, Resident Town, and Fiscal Responsibility.**

**Use Steps 8 through 9 when the student’s Resident SAU, Resident Town, and Fiscal Responsibility changes during the school year.**

3. Click on the **Enrollment History** tab.
4. In the Line column, click on the Line number of the enrollment to select the row – the selected row will turn blue.
5. Click **Show Detail** to expand the enrollment.

**Student**

Menu < > Save Undo + Add

Student Name: **Lennon, John W.** School: **Rock Star High School**

Demographics Parent/Guardian Enrollment Enrollment History

Last Name: Lennon First Name: John Middle Name: Suffix: State Student ID: 150023545 Grade: 10 Gender: Male

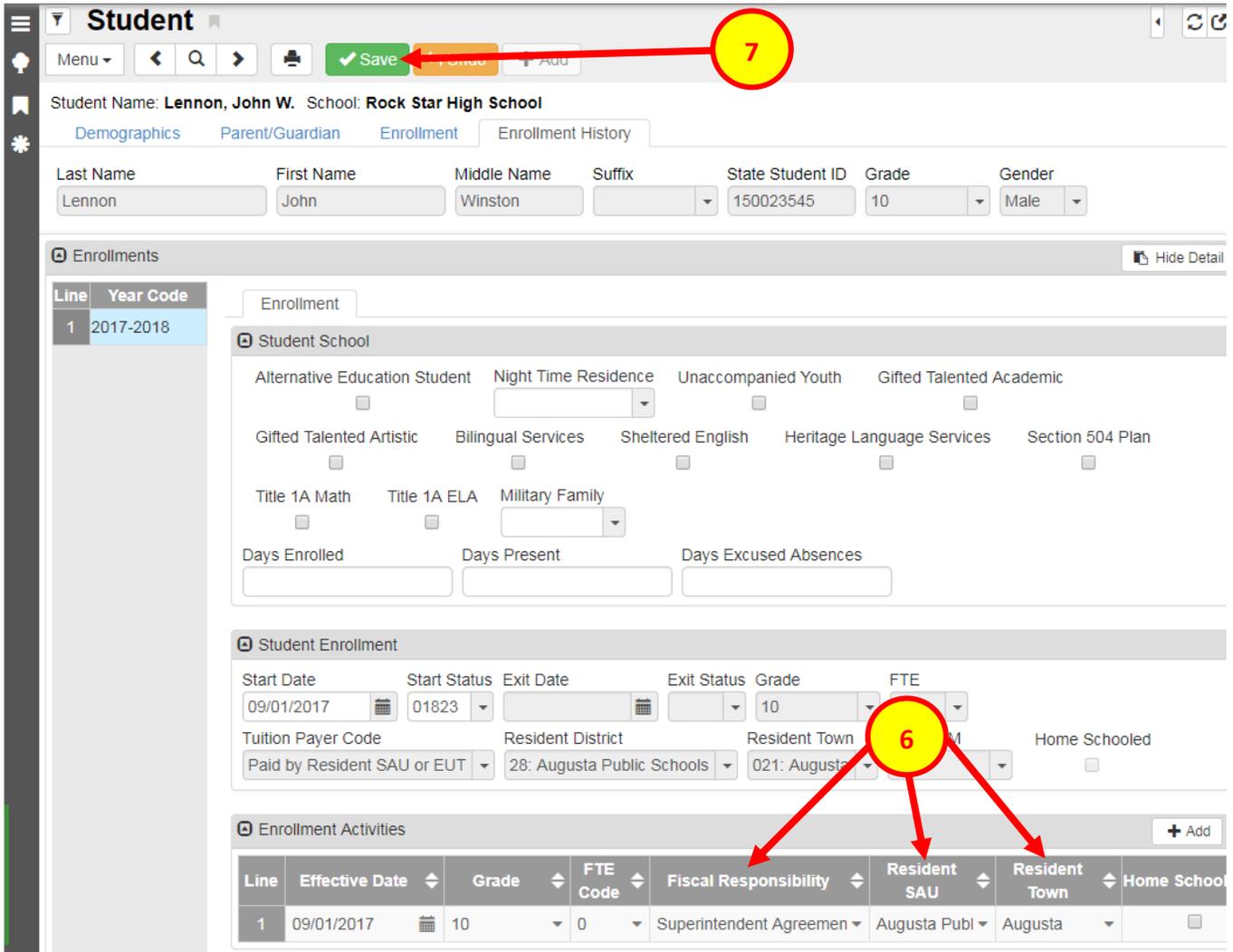
**Enrollments** Show Detail

Line	Year Code	Start Date	Start Status	Exit Date	Exit Status	Tuition Payer Code	Grade	Organization Name	ADA/
1	2017-2018	09/01/2017	Transfer from			Paid by Resident SAU or EUT	10	Rock Star High School	

6. In the Enrollment Activities section, select the Fiscal Responsibility, Resident SAU, Resident Town in the drop down.

A list of Fiscal Responsibility codes and Resident SAU/Resident Town codes can be found here:  
[https://www.maine.gov/doe/data/student/Synergy\\_upload.html](https://www.maine.gov/doe/data/student/Synergy_upload.html)

7. Click **Save**.



The screenshot shows the 'Student Enrollment Activities' section of a web application. At the top, a navigation bar contains a 'Save' button (green) and an 'Undo' button (orange), both highlighted with a red circle labeled '7'. Below this, the student's name is 'Lennon, John W.' and the school is 'Rock Star High School'. The 'Enrollment Activities' table is visible at the bottom, with a red circle labeled '6' pointing to the 'Fiscal Responsibility', 'Resident SAU', and 'Resident Town' columns. The table contains one row with the following data:

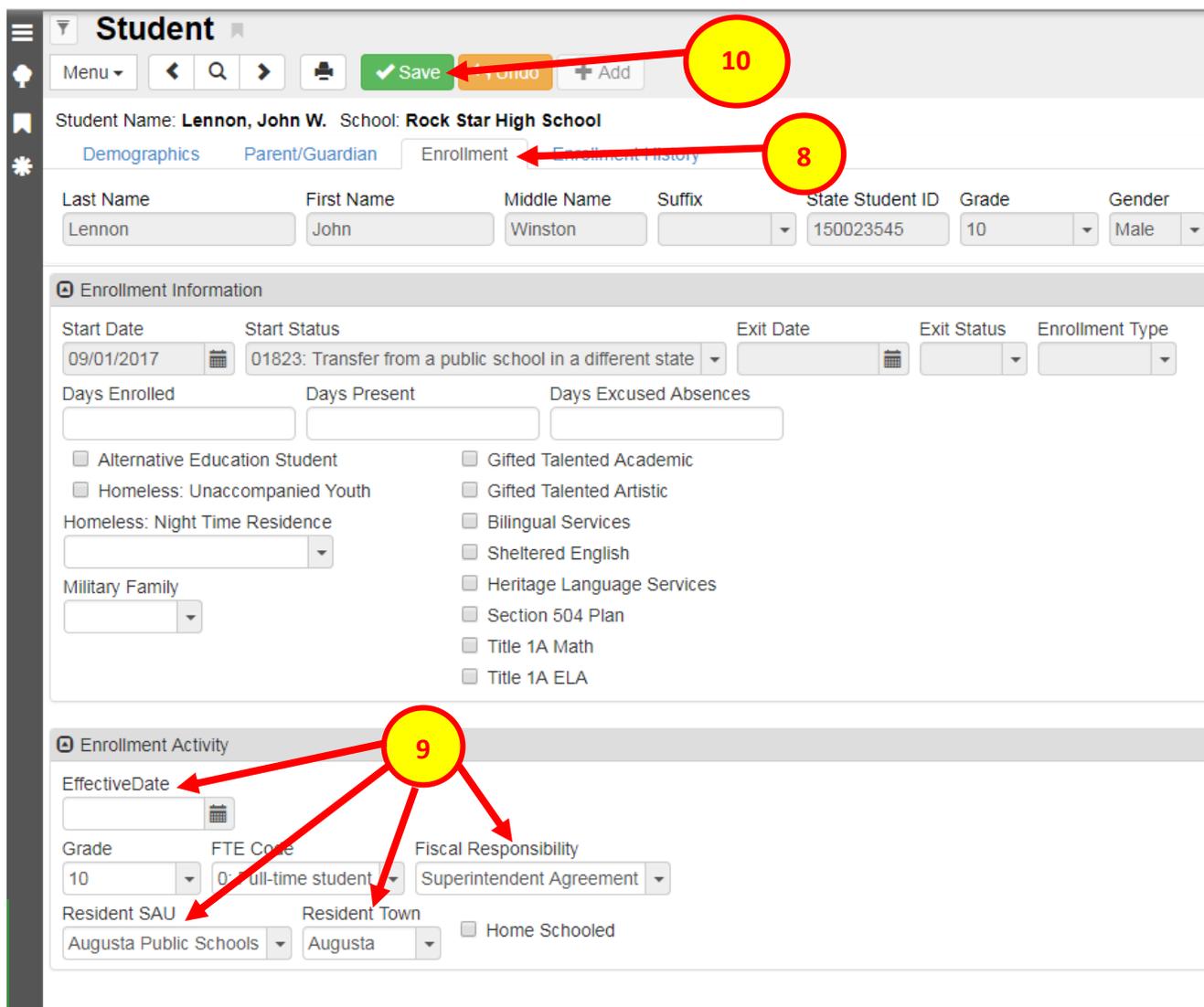
Line	Effective Date	Grade	FTE Code	Fiscal Responsibility	Resident SAU	Resident Town	Home School
1	09/01/2017	10	0	Superintendent Agreemen	Augusta Publ	Augusta	<input type="checkbox"/>

- 8. Click on the **Enrollment** tab.
- 9. In the Enrollment Activity section, type in the Effective Date (the day the change occurred) and select the Fiscal Responsibility, Resident SAU, and Resident Town in the drop down.

A list of Fiscal Responsibility codes and Resident SAU/Resident Town codes can be found here:

[https://www.maine.gov/doe/data/student/Synergy\\_upload.html](https://www.maine.gov/doe/data/student/Synergy_upload.html)

- 10. Click **Save**.



The screenshot shows the 'Student' profile page for **Lennon, John W.** at **Rock Star High School**. The 'Enrollment' tab is selected. In the 'Enrollment Activity' section, the 'EffectiveDate' field is empty. The 'Fiscal Responsibility' dropdown is set to 'Superintendent Agreement', 'Resident SAU' is 'Augusta Public Schools', and 'Resident Town' is 'Augusta'. The 'Save' button is highlighted with a red circle and labeled '10'. The 'Enrollment' tab is labeled '8', and the 'Enrollment Activity' section is labeled '9'.